

Research Report on China's Anti-Alzheimer's Disease (AD) Drug Market, 2013-2017- By China Research and Intelligence



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By the end of 2011, people aged 60 and above reached 185 million in China, accounting for 13.7% of the population, with an increase of 0.47 percentage point compared with that at the end of 2010. The elderly population in China will exceed 200 million by the end of 2013 and reach 221 million in 2015, accounting for 16% of the population, with a severe population aging trend. Globally, the GDP per capita of developed countries is generally between USD 5,000 and USD 10,000 when becoming aging nations. In over 70 aging-population countries worldwide, the GDP per capita of over 40% of them is more than USD 10,000. However, the GDP per capita of China was only over USD 5,000 in 2011, which indicated that China became an aging nation in advance.

AD is a primary nervous system degenerative disease caused by many factors. Clinically, it is characterized by progressive memory losses, decline in cognitive ability, abnormal behaviors and loss of self-care ability of daily living at last. AD is a common geriatric disease, and the incidence rate in China continuously rises in recent years.

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In China, AD often occurs to people aged over 65, accounting for about 4% to 5% of population in this age group, with nearly 10% of people aged over 75 and around 20% of people aged above 85. It indicates that the morbidity rate of AD doubles with each 10-year-old increase in the age of the elderly.

According to conservative estimates, there are 8 million to 10 million senile dementia (mainly including AD, as well as vascular dementia(VD), mixed dementia and elderly dementia caused by systemic diseases) patients in China, of which less than half of them are able to receive effective treatment.

Although there are many controversies over AD in the medical field currently, the pathogenesis and treatment methods of AD in particular, the development of some drugs also advances in this controversy as progress is achieved in the research on pathogenesis.

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In China, people do not correctly know AD for a long time, believing that the decline in cognitive functions and memory losses of the elderly are normal aging phenomena. Therefore, only some brain cell resurrection drugs (such as Oxiracetam and Piracetam) or antioxidants (e.g., Ginkgo Biloba Preparation) are generally applied at home for the treatment of AD for quite some time, with extremely limited curative effects. In recent years, as the best-selling drugs of some developed countries successively enter China, the therapeutic effect on AD sharply rises, and the growth rate of the drug market is obvious.

However, as the treatment expense of these drugs is high and they can only control but not reverse patients' conditions, the application is influenced, which results that the existing drugs specifically for AD in domestic hospitals are not widely accepted by patients. Though the overall market size of senile disease drugs annually is huge in China, the market size of therapeutic AD drugs is still relatively small. In 2011, the top 5 in China's hospital-use anti-AD drug market were Ganglioside, Gginkgo Biloba Preparations, Oxiracetam, Deproteinized Calf Blood Extracts and Edaravone, which aggregately accounted for 70% of the market share.

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